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ABSTRACT

This report describes a five-part study conducted at the Brigham Young University library during the winter semester of 1987 to assess the quality of the reference service provided to library patrons by student reference assistants (SRAs) after a full semester of SRA participation in the reference patron service system. The study focused on determining: (1) the accuracy of information patrons received; (2) the level of skill SRAs used in negotiating patron needs; (3) the ability of SRAs to refer patrons to professional librarians; and (4) the degree of satisfaction patrons felt about the service they had received. The five studies included an unobtrusive question test for the SRAs and surveys of patrons, reference assistants, department assistants, and professional librarians. Following an introductory discussion, study findings are presented on the quality of reference service, the work environment, SRA training, and the professional librarian's reference desk service role. It is concluded that problems exist with the current reference service, and recommendations are presented for the areas of performance standards, training improvement, and subject specialist involvement. The study questionnaires and surveys are included in five appendices. (KM)

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An Evaluation of Reference Desk Service in the Brigham Young University Library

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An Evaluation of Reference Desk Service
in the
Brigham Young University Library

Studies of academic and public libraries across the country are revealing serious deficiencies in the quality of their reference service. Recent studies show that only 55 percent of the factual and bibliographic questions asked are answered correctly. In addition librarians often provide only partially correct information, demonstrate a lack of familiarity with the most basic reference sources, allow an "internal clock" to limit the amount of time they devote to patron queries, negotiate patron needs poorly, and only infrequently refer patrons to someone more informed.[1]

In the Lee Library, the reorganization of the reference departments by the administration in 1986, based on the recommendations of the Graduate Council and the Faculty Library Council, created a patron service system staffed by student reference assistants (SRAs) and fulltime paraprofessional department assistants (DAs). Professional librarian subject specialists (SSs) were removed from staffing reference desks to place greater emphasis on their collection development and faculty liaison responsibilities. The SSs became involved in offering patron service at the reference desks only when the SRAs determined that they needed the additional subject expertise.

Recognizing the potential for a decrease in reference service effectiveness and aware of the problem nationally, the library administration appointed a committee to evaluate the quality of service received by library patrons at the reference desks. For comparison it would have been desirable to have evaluated the reference service prior to the change, but this was not possible. A five-part "management study"[2] was designed to assess the quality of the reference service provided by the SRAs after a full semester under the new system. The studies focused on determining the accuracy of information patrons received, the level of skill SRAs used in negotiating patron needs, the ability of SRAs to refer patrons to professional librarians, and the degree of satisfaction patrons felt about the service they had received. The five studies, conducted during Winter Semester 1987, included:

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[1]Peter Hernon and Charles R. McClure. "Library Reference Service: An Unrecognized Crisis--A Symposium." The Journal of Academic Librarianship 13.2 (1987): 69-70.

[2]A management study, as opposed to a research study, as defined by Peter Hernon, uses techniques that provide indicators rather than strictly valid statistical data that can be broadly generalized. Management studies, however, provide valuable information for making informed management decisions.

Patron Survey: Approximately 100 library patrons were approached at the conclusion of their interchange with a reference employee and were asked to complete a short questionnaire. (See "Library Reference Service Questionnaire" in Appendix A.) Library employees observed activity at the reference desk, waited until the patron had completed a reference interview and any follow-up assistance, then followed the patron to a point where the desk assistant could not observe what took place, and asked the patron to complete the questionnaire. Questionnaires were administered at all reference desks during all hours of reference operation over a two-week period.

Unobtrusive Question Test: Fifteen library employees were selected as "proxy patrons" and each given five pre-researched questions and answers to ask at the appropriate reference desk during a time block previously assigned to assure that each SRA would be asked at least one question. The proxies then completed a form describing what took place in each of the reference interviews and evaluating the quality of service given by the desk assistant. (See Appendix B for "Unobtrusive Question List," "Proxy Instructions," and "Reference Question Report".) The questions were selected from questions previously asked at the various reference desks or based on similar types of questions and required substantive factual or bibliographic information as an answer. The questions were based on sources, library systems, and negotiation and search skills and strategies on which the SRAs had been trained or instructed to be familiar with. Proxies were instructed to create a context for each question to assure that SRAs would not suspect that they were involved in a test. Fifteen of the 75 questions were called "escalator questions" and were designed to evaluate question negotiation skills. The correctness of answers given to these questions was determined by whether or not the desk assistant negotiated adequately to arrive at the "true" question.

Reference Assistant Survey: All SRAs employed at the five reference desks in the library were asked to complete a questionnaire. (See "Reference Assistant Questionnaire" in Appendix C.) Questions were asked regarding their background, job responsibilities and work environment, and reference training. Twenty-eight responded. To assure anonymity, they returned the questionnaire to a committee member, not their direct supervisor.

Department Assistant Survey: The five paraprofessional DAs were asked to complete a questionnaire in which they responded to questions about their background, job responsibilities and work environment, departmental reference service, and reference training. (See Appendix D for "Department Assistant Reference Survey".) Although these five people vary in their level of involvement in reference activities in their individual departments, they are all directly involved in reference desk service and in some instances supervise the SRAs at the reference desk.

Professional Librarian Survey: The nineteen professional librarians (seventeen subject specialists, and two General Reference librarians) responded to questions regarding their background, their perception of the effectiveness of SRAs, reference training, and professional involvement in reference service. (See Appendix E for "Professional Librarian Reference Survey".)

All of the studies focused not only on factors that affect the quality of the service given at the reference desks by the SRAs, but also on the interactions and relationships among the SRAs, the DAs and professional librarians that affect the service.

This report integrates the findings of these five studies, showing cross correlations whenever possible, under the following major categories: (1) quality of reference service, (2) training, (3) role of professional librarians in reference desk service, and (4) conclusion and recommendations.

Quality of Reference Service

Since the quality of the reference service performed at the reference desks by the SRAs was the prime focus of the evaluation, the study attempted to obtain pertinent information about this service from various perspectives--from patrons, from the patron proxies, from the paraprofessional DAs, from the professional SSs, and from the SRAs themselves.

Reference Interview

The study addressed the four components of the reference interview:

1. Question negotiation between SRAs and patrons.

2. Search strategies used by SRAs in providing or attempting to fulfill the patron requests.

3. Correctness of the answer provided.

4. Referral, when required, to another more appropriate source to obtain a satisfactory answer, i.e., other SRAs, the DAs, SSs, another library department, or a non-library resource.

In addition patrons, proxies, DAs, and SSs rated their perception of the quality of the reference service provided by the SRAs.

Question Negotiation.

The most basic element of providing effective reference service is for the SRA to know as precisely as possible what the patron needs. Of the 75 questions in the Unobtrusive Question Test, 52 needed or could have benefited from negotiation with the patron to determine the exact need. The SRAs negotiated only 31 questions (60 percent). (See Table 1.)

Table 1. Question Negotiation

No. needing negotiation	No. negotiated	Percent
52	31	60

Fifteen of the 52 questions, called "escalator questions," required the SRAs to negotiate the patrons' specific needs because the proxy patrons asked the questions in very broad terms. Table 2 shows that the SRAs negotiated 100 percent of the explicit questions, but only 50 percent of the implicit ones.

The questions with the implicit need for negotiation attempted to account for the numerous patrons who appear to know exactly what they want and only need to know where it is located. Experience has shown, however, that patrons who express their requests in this positive, informed way often only appear informed and must have their real need negotiated before they can be given effective service.

Table 2. Negotiation of Escalator Questions

Type of Question	No.	No. negotiated	Percent
Explicit Need for Negotiation	5	5	100
Implicit Need for Negotiation	10	5	50

Explicit asked in terms of "I need information ..."
Implicit asked in terms of "Where is a specific book or area of the library."

The SRAs recognized and responded well to explicit requests for negotiation, but not so well on the implicit requests. This suggests that the problem is not an inability to negotiate with patrons, but a failure to recognize more subtle requests or an unwillingness to question patrons who seem knowledgeable and informed and state their requests in such specific, positive terms.

The DAs and SSs rated the SRAs' ability to negotiate questions 3.6 (5=very strong; 1=very weak) and 2.8 respectively. It appears that the SS perception is closer to the performance demonstrated in the Unobtrusive Test than that of the DAs. It may be that the DAs themselves, even though they work more closely with the SRAs, are not as aware of what good negotiation may be as the SSs. It also suggests the need for better training in this skill, not only for the SRAs but for the DAs as well.

Search Strategies

Once a patron's needs have been clarified, the SRAs must then develop a strategy for providing the information the patrons need. Essentially this process involves selecting appropriate reference books, or other information sources, and using them effectively to give as full an answer as possible to the patron query.

The data in Table 3 show some problems in the search strategies used by the SRAs to find requested information. Superficially, it appears that the greatest number of questions were answered either correctly or correctly but

incompletely by using one source, and the fewest number from not consulting any source. However, this result reflects the type of questions used in the test more than it does the value of using a certain number of sources in finding an answer. More likely, it shows that when SRAs find an answer, correct or incorrect, from the first source they consult, they search no further. In fact, the 19 questions (25 percent) only partially answered suggests that SRAs may be relying too heavily on too few sources, may not understand the question fully enough to provide all the information required for a complete answer, or do not have or take enough time.

Table 3. Effectiveness of Search Process Used in Answering Questions

Search Process Used	No. of Questions	Answer				
		Correct/ Complete	Referred	Correct/ Incomp.	Wrong	None
Answered w/o consulting a source	14	0	2	3	4	5
Used one source only	18	12		5	0	1
Used several sources	17	5	1	3	2	6
Gave patron source w/explanation	10	5		4	0	1
Gave patron source w/o explanation	16	2	0	4	6	4
Totals	75	24	3	19	12	17

The above data also show that when patrons are referred to specific sources to find the information on their own, a common practice at most reference desks, they find more correct answers when the SRA shows them how to use the reference source rather than just pointing it out.

Correctness of Answers

The ultimate test of the SRAs' effectiveness is the number of correct answers they provide to patron queries. Table 4 shows that in the Unobtrusive Question Test SRAs showed serious deficiencies in their ability to provide complete and correct information.

No standards have been set by the Lee Library for the percentage of correct answers that should be provided by SRAs. It has been assumed that patrons will receive the help or correct information they need as efficiently as possible regardless of whether they are served by SRAs, DAs, or SSs.

Yet in this test, only 36 percent of the 75 questions asked by proxy patrons resulted in completely correct answers. Another 25 percent received partially correct or incomplete results from their query. And even if we include the correct but incomplete answers, the result is still only 61 percent with any degree of correctness. As noted earlier, the acceptability of such a result is being seriously questioned by the profession at large and should be questioned

by the Lee Library as well.

Table 4. Correctness of Answers Given Proxies

Result	No.	Percent
Positive Results		
Correct and complete	24	32
Referred appropriately	3	4
	27	36
Negative Results		
Correct but incomplete	19	25
Incorrect	12	16
Unable to answer	17	23
	48	64

The perception of other reference department staff as to the effectiveness of SRAs in those factors essential for good reference service also supports the view that SRAs do not perform at a desirable or acceptable level. Table 5 shows that the subject specialists rate the SRAs at 2.9, slightly below the midpoint between "very weak" and "very strong," or a little below mediocre, while the DAs rated them at 3.7, only slightly below 4, or "strong."

Table 5. Effectiveness of Student Reference Assistants in Reference Skills as Perceived by Other Department Staff

Skill or Trait	Subject Specialists	Department Assistants
a. Subject knowledge	3.0*	4.0
b. Knowledge of reference books	3.2	3.4
c. Question negotiation ability	2.8	3.6
d. Developing search strategies	2.4	3.6
Composite Rating	2.9	3.7

*1=Very weak; 5=Very strong

While no standard has been established for equating the ability to give correct answers to reference questions with a rating of SRA effectiveness, a score of 36 percent (Table 4) in giving complete and correct answers seems too low for a rating of 2.9 (mediocre) or especially 3.7 (strong). It seems more accurate for the effectiveness rating to be closer to 2 (weak), since the reference effectiveness should be heavily weighted on the ability to provide correct answers.

Interestingly, the subject specialists, who generally have less contact with the SRAs, arrived at a more accurate assessment of their question answering

ability than did the fulltime DAs, who work more closely with them, even supervising their reference service directly. However, most of the DAs were new to their reference desk responsibilities and lack the experience and the subject expertise of professional librarians.

Referrals

Another important component the study attempted to measure was the performance of the SRAs referring patron requests to someone more qualified than they to provide the requested information. Crucial to this process is the ability of the SRAs to recognize when they need to refer and their willingness to do so. The study addressed three aspects of this essential component of effective reference service. The unobtrusive question study provided information about what SRAs did when unable to answer questions, the SRA questionnaire asked about the availability of the professional librarians for referrals when needed, and the SS questionnaire asked how many referrals the professional librarians had received.

Table 6 shows that in the Unobtrusive Question Test, the SRAs could not provide a suitable answer to 17 of the 75 questions asked. Of these, they referred 11 questions (65 percent), 7 to professional librarians and the rest to other SRAs, DAs, or other library departments. But this leaves 35 percent of the unanswered questions not referred. Obviously, SRAs frequently do recognize their own limitations and seek more informed help for patrons, but over a third of the time they do not.

Table 6. Referral of Unanswered Questions

No. of Unanswered Questions	No. of Questions Referred to					No. of Questions Not Referred / %	
	Dept. staff	Library Dept.	Prof. Lib.	Outside Lib. / %			
17	1	1	7	2	65%	6	35%

This test also showed that of the 31 questions incorrectly or only partially answered (see Table 4) none were referred appropriately. It appears that when SRAs find some information, even if it is incorrect or incomplete, that terminates the interview. Their lack of subject expertise in many of the disciplines they are required to service leaves them unable to assess accurately the appropriateness of the information found. This means, of course, that a satisfactory referral program needs to consider more than just the SRAs' ability to find information. It is not just "some" information that is important, but "correct and complete" information.

Compounding the problem of assuring an acceptable referral situation, are the perceptions of the SRAs about the availability of the professional librarians when they were needed for referrals. While the working relationship between the professional librarians and the SRAs and DAs is perceived to be quite positive (see Table 12, p. 13), the responses from both the SRAs and the

DAs strongly indicate that the professionals are often not available as a backup resource when needed.

Table 7. Professional Librarian Availability

As perceived by:	Rating:
SRAs	3.1*
DAs	3.8
Themselves	4.2

*1=Rarely; 5=Almost always

The SRAs and DAs were asked to rate the subject specialists "in their role as backup to the reference desk" while the subject specialists were asked to rate themselves "during assigned backup hours." Since over half the SRAs commented on the lack of SS availability when referrals needed to be made, it is apparent that SRAs feel that professional librarians are not as available as they themselves or the DAs perceive them to be. The following are a few representative comments:

"It seems they are always at meetings or off doing other things."

"Have at least someone available at all times during the day."

"Some of the specialists are difficult to find. If I knew when they'd be in so I could tell patrons, that would be helpful. Too often I just know that the specialist is out; I don't know when they'll return."

"Our full time librarians are overloaded and are often away from their offices at meetings or fulfilling other responsibilities. In order for them to be more available as resources, they need to be freed from some of their other pressing duties."

"The subject librarians really should be more approachable and available. Often I feel that patrons and patron questions fall too low on their priority list. Or that they feel annoyed by reference questions."

"I feel very strongly that some subject specialists should be here at night and on weekends. Just because they have more experience with the library's collection."

The DAs made the same type of comments:

"Keep desk hours."

"Post office hours."

"Meetings, personal schedules, or other demands leave time periods when no professional is available to act as a resource or backup person."

The SSs' estimate of the number of referrals they received during a typical mid-semester week (Table 8) shows a low number of referrals, less than two per hour for all the hours they work, and less than one during assigned backup hours. They also reported receiving fewer than one appointment negotiated at the reference desk per week.

It is impossible to determine from the data obtained whether the low number of referrals was caused by the lack of availability of the SSs or the failure of SRAs to refer as often as needed. But the data does point up a problem. Since a satisfactory referral system is essential to the reference system used in the library, steps must be taken to create a more workable referral environment to overcome the deficiencies discovered through this study.

Table 8. Professional Librarian Estimate of Source of Question Referrals/ Typical Mid-Semester Week

Source	Total Referrals Received	Ave./ Librarian /Week	% of Total Ref.	Ave./ Hour
During Set Backup Hours	150	9.37	41	0.94
During other office hours	204	12.75	55	0.43
By appointment through desk	14	0.87		n/a
Total Referrals Received	368			

Overall Effectiveness

The SSs and DAs were asked to rate the SRAs on approximately 12 factors important to their effectiveness as reference assistants, not just on their question answering capabilities. The ratings, as shown in Table 9, are almost identical to those given for the 4 factors directly related to question answering ability, 2.8 compared to 2.9 and 3.8 compared to 3.7. Thus, they are perceived by the SSs to be "mediocre" and to the DAs as "fairly strong." However, the greatest discrepancy between the two is in the ability of the SRAs to give effective service in the department, which was the second lowest rating by the SSs (2.7) and the highest rating by the DAs (4.2).

It is apparent that the standards or criteria on which these perceptions are based are not universally defined or agreed upon. It is important for the library to establish objective standards or expectations for SRAs that can be applied uniformly in evaluating their performance and in developing corrective measures to improve that performance.

Table 9. Effectiveness of Student Reference Assistants as Perceived by Other Department Staff

Skill or Trait	Subject Specialists	Department Assistants
a. Subject knowledge	*3.0	4.0
b. Knowledge of reference books	3.2	3.4
c. Question negotiation ability	2.8	3.6
d. Developing search strategies	2.4	3.6
e. Question referral ability	3.0	4.0
f. Awareness of library policies	3.6	4.0
g. Relying on one another for help	3.5	4.0
h. Enforcing library policies	3.1	3.8
i. Ability to help patrons understand library org. and systems	3.4	4.0
j. Overall ability to give effective service in department	2.7	4.2
k. Overall ability to give effective service in your subject areas	2.8	n/a
l. Backing up other student reference SRAs	n/a	4.0
Composite Rating	2.8	3.8

*1=Very weak; 5=Very strong

Work Environment

Another important factor affecting the quality of reference service is the work environment. The SRA survey specifically addressed this issue and responses from the patron and proxy surveys also give additional insight.

Work Load

The SRAs were asked to evaluate their work loads at the reference desks in relation to the flow of patrons requiring service. The patrons and proxy patrons reported on the availability of the SRAs to offer assistance at the desk. Table 10 compares reported availability with the SRAs' evaluation of their work load.

The SRAs were free to help the proxies 41 percent of the time when they first appeared at the reference desk. Only 33 percent of the time were the SRAs already occupied with another patron. The average time spent waiting for help in the latter case was less than three minutes. In 11 percent of the cases, the SRAs were busy working on a project and were free to help the proxies as soon as they had their attention. Thus, 86 percent of the time, the proxies received help either immediately or within three minutes.

Table 10. Evaluation of Availability and Work Load

Availability					Work load	
SRA was	Reported by				Duty	Rating
	Proxy		Patron		Patron service	3.3*
					Other duties	2.8
	No.	%	No.	%		
Free to help	31	41	53	55		
Helping another patron	26	34	29	30		
Working on project	8	11	n/a	n/a		
Away from desk	8	11	9	9		
Other	2	3	6	6		
Total	75	100	97	100		
					*1=Too light	
					5=Too heavy	

The patron survey indicated that SRAs were free to help patrons 55 percent of the time and only busy with another patron 30 percent of the time. Since none reported waiting longer than three minutes, 85 percent of them received help within three minutes. These results correlate with the SRAs' perception that the demand for patron services, at 3.3 on a 5 point scale, is neither too light nor too heavy. In general, the SRAs felt comfortable with their work load and their ability to perform both their reference and other departmental responsibilities in the time they had available.

However, some SRAs commented that at times patron service suffers because SRAs do not have or do not take sufficient time to help one patron because another one is waiting. Often they are not able to return to the first patron for follow up. Consequently, the appearance of service is good, but in reality the SRAs know that more complete service could have been provided had there been sufficient time or additional desk personnel. One assistant, commenting on the need for more staff, stated: "Should have more people (experienced people) here at night and on weekends on all floors. It's not very good reference service now during fall and winter semesters. Reference personnel are 'stuck' at the desk and no one is available, usually, to actually go into the stacks and help the patron. This should be changed."

Patron satisfaction rates high, however, likely because they are generally not aware that better, or more complete, service could have been given. Indeed, from the patron survey, it appears that patrons seem quite happy with whatever service they receive. Several patrons did qualify their satisfaction rating with a "this time" comment, suggesting that a more comprehensive study of patron satisfaction might yield different results.

Distractions

The SRAs were asked to rate certain distractions as to the extent they interfere with good reference service (see Table 11). Beyond the need for more

adequate staffing (referred to elsewhere in the SRA survey), these data indicate that the main area of concern should be the unnecessary visiting that goes on at the reference desk (2.3). More useful data on visiting could have been obtained if separate questions had been asked concerning patrons and friends. The shelving and shelfreading assignments (2.4) are indispensable to good service, but their timing must be scheduled so as not to interfere with patron service.

Table 11. Distractions from Reference Service

Distraction	Rating
Reshelving and shelfreading	2.4*
Talkative patrons and friends	2.3
Desk projects	1.8
Other department assignments	1.7
Maintaining equipment	1.7
Other reference assistants	1.5
Full-time library personnel	1.5
Composite rating	1.8
*1=Not at all; 5=A great deal	

While none of the distractions above were rated even as high as the midpoint of 2.5, supervisors need to monitor desk activities closely to assure that patron service receives top priority. And administrators need to provide adequate backup support so reference assistants can spend more quality time helping patrons.

Emotional climate

Another factor affecting the effectiveness of the reference service is the "emotional climate" under which the staff work, i.e. their relationships with others in the department, feeling appreciated, and feeling important to the department. Both the SRAs and the DAs ranked the emotional climate as quite important (4.5 and 4.8 respectively on a scale of 1 to 5).

Table 12. Working Relationships

Working relationship with	As rated by SRAs	DAs
Dept. chairman/ref. coord.	4.4*	5.0
SSs	4.2	4.6
DAs	4.4	n/a
SRAs	4.4	4.6
Being treated fairly	4.5	4.8
*1=Very negative; 5=Very positive		

Table 12 shows that both groups consider their relationship to the various groups of people they work with and their feeling of being treated fairly in work assignments and work schedules as "positive" or "very positive". Significantly, however, the lowest ranked relationship is that between the SRAs and the SSs, suggesting that steps need to be taken to provide more training and periodic social interaction for the SRAs with the professional librarians. This relationship is important, as shown above, if we are to improve the referral of patron queries to the SSs for professional help.

Student Reference Assistant Training

Since the major reason for studying the effectiveness of the reference service provided by nonprofessional SRAs and DAs was to determine the quality of reference service and to suggest changes needed to correct any deficiencies discovered, the study addressed the vital issue of training. This obviously becomes a critical issue when students are hired to perform what the library profession considers a professional responsibility, requiring substantial education, subject expertise, and a broad background.

The study focused on pre-employment preparation and background for the job, training topics found most helpful for initial and inservice training, and training methods and practices. The responses of the SRAs, DAs, and SSs, provide insights and suggestions that can help the library improve its training program significantly with a resulting improvement in patron reference services.

Pre-Employment Background

The SRAs had a wide variety of subject backgrounds and work experience. Many had undergraduate degrees or were studying toward degrees in the subject disciplines represented on the levels of the library where they worked. However, a large percentage of the graduate SRAs were in the Masters of Library Science program and did not have undergraduate degrees related to their work assignments.

On a scale of 1 to 5 (5=very helpful), the SRAs ranked their academic major 4.4, close to "very helpful" in helping them perform effectively as a reference assistant. They also felt that almost any academic study, work or personal relations experience - degrees, travel, classes, military, secretarial/receptionist work, reading, missions, debate, etc. - is valuable in preparing reference personnel to deal effectively with library patrons.

It is apparent that in hiring SRAs, department chairmen should examine critically not only the class standing of applicants, but their undergraduate and graduate academic majors and other life experiences as well. The more relevant the pre-employment preparation of the applicant is to the job, the more successful that person will be as an SRA.

Initial Training

The surveys of the three categories of reference personnel all asked about topics and priorities for training, both initial and inservice training, and

about methods of instruction. Although not all survey questionnaires asked the same questions in the same way, direct correlations of responses have been made whenever possible.

Initial Training Topics

Since it is important for SRAs to be properly grounded early in their reference experience, the study focused on topics for initial training, those presented during the first month of employment. Table 13 presents the results of the surveys of the three categories of reference personnel. Only the underlined numbers in the SS column, however, correlate directly.

Table 13. Compared Rankings of Training Topic Importance for Initial (1st month) Training of Student Reference Assistants

Topic	DAs	SRAs	Ave.	SSs
Reference sources at Desk	5.0*	4.9	4.95	4.4
Patron Service Priorities	5.0	4.7	4.85	n/a
Desk Routines	4.6	4.9	4.75	4.8
Reference sources on Index Tables	4.6	4.9	4.75	4.4
Question Negotiation Skills	4.8	4.6	4.70	4.8
Search Strategies for answering quest.	4.4	4.9	4.65	3.8
Computer Systems	4.6	4.7	4.65	4.4
Job Expectations	4.8	4.4	4.60	n/a
Tour(s) of the floor	4.6	4.5	4.55	n/a
Library Policies and Procedures	4.6	4.3	4.45	4.3
Reference sources in Reference Stacks	4.0	4.5	4.25	4.2
Card Catalog & Card Indexes	4.2	4.2	4.20	4.4
Department Organization	4.8	3.4	4.10	4.4
Subject Collections in Stacks	3.4	3.9	3.65	n/a
Tour(s) of other areas	3.8	3.4	3.60	2.9
Reference Sources on Other Floors	3.4	3.7	3.55	n/a
Composite Rating	4.4	4.4		

*1=Not important; 5=Very important
Underlined numbers under SSs correlate with other cols.

Both SRAs and DAs agreed on the most important topic for initial training, reference sources at the desk (4.95). Patron service priorities were slightly higher for DAs but averaged 4.85. This response likely was prompted by the anxiety every new employee feels when assigned to the reference desk for the first time. It is natural for them to want to know just how to treat the patron, how much service to provide, and what sources will answer the questions, before they assist their first patron.

The ability to handle the normal desk routines (4.75) and to understand the periodical indexes (4.75) were next in importance to all groups although slightly more important to the SRAs. These issues surface almost immediately at the desk and SRAs understandably want to appear competent.

The communication skills required to negotiate patron needs was rated important by all three groups (4.75 average), but it was rated in seventh place by the SRAs, and first and third by the SSs and DAs, suggesting that the SRAs may not be fully aware of its importance. Yet, the failure to properly negotiate questions contributed to the low performance in the Unobtrusive Question Test.

In the areas of less common agreement, the DAs stressed the importance of initial training on department organization (4.8), policies and procedures (4.6), job expectations (4.8), and resources in other library areas (4.6), while the SRAs rated these areas somewhat lower and emphasized instead the need to know the reference collections. Again, the students seem to be more concerned with lowering the anxiety level at the desk, while the DAs, who must oversee the department routines and the students, place more emphasis on supervisory and management functions.

Yet none of the topics received low rankings. All were above the midpoint of 3. Even the lowest SRA and DA average of 3.55 on reference sources on other floors is a relatively high rating. Clearly, all of these topics need to be included in an initial training program, but these data show that training programs need to be properly structured and prioritized.

The SSs' ratings in the categories of desk routines, negotiation skills, and policy and procedures are very close to the average rating of the DAs and the SRAs. They differ primarily in feeling that SRAs do not need initial training on what is in other areas of the library as much as they do what is on their own floor (2.9). Yet they rated their own need to know other levels at 3.6.

The SSs and DAs survey questions asked about training in "complex" search strategies rather than "search strategies to help patrons" as in the SRA survey. The DAs' 4.9 rating compared to the SSs' 3.8 shows a strong difference of opinion as to its importance. This may indicate that the SSs want SRAs to refer the more difficult questions to them. Yet, the unavailability of the professionals for consultation, as discussed above (see Table 7 and the SRA comments on pp. 8-9), make it difficult for SRAs and DAs to feel good about the service they give and feel a need to know the complex strategies themselves.

Their comments show a strong concern with giving good service and the need to be trained adequately to give that service. If the professionals are not available to handle the difficult questions, then sufficient time needs to be devoted to training SRAs so they can effectively work through the in-depth strategies. This would suggest more involvement of the professionals in the training program or an opportunity for students to work side by side with professionals as difficult reference problems are solved. At least, an opportunity should be provided for students to review the strategies used by the professional to solve the problem so that the next time a similar question is asked and the professional is not available, the SRAs can give proper service.

Initial Training Effectiveness

All reference departments train the SRAs when they are hired, but the library has no organized program for such training. Each department develops its own training program to meet its perceived needs. The SRAs and DAs, however, differ as to their perception of the effectiveness of this training.

The composite ratings in Table 14 of 4.3 to 3.8 show that SRAs are not as satisfied with the training program overall as the DAs. Particularly important with an SRA rating of 3.5 (only half a point above mediocre) and a difference of .9 is the deficiency in presenting the material in an understandable way. Considerably more attention needs to be given to the way in which the information is presented to the new trainees to insure they understand and remember the concepts presented. (Training methods are discussed below.)

Table 14. Effectiveness of Initial Month's Training Programs

Training Factors	DAs	SRAs	Difference
Prepared adequately to function	4.2*	4.1	.1
Covered areas they needed to know	4.4	4.2	.2
Provided at appropriate time	4.2	3.9	.3
Side-by-side, on-the-job instruction	4.4	3.9	.5
Structured and clearly organized	4.4	3.8	.6
Supported with useful exercises	4.2	3.5	.7
Effective general library orientation	4.0	3.2	.8
Presented in understandable way	4.4	3.5	.9
Composite Rating:	4.3	3.8	.5

*1=Poor; 5=Excellent

The above ratings show that the SRAs' perception of the effectiveness of the initial training in most areas falls between average (3) and good (4), suggesting that significant improvements can and should be made in training programs. Yet in spite of the lower ratings on several factors, the SRAs felt (and the DAs agreed) that they are adequately prepared to function effectively at the reference desk. Since, so far as they know, they have functioned satisfactorily thus far with whatever training they have received, this probably justifies their feeling that they must have been prepared adequately. Another possible explanation is that neither of these groups may be fully aware of the competency expected by the subject specialist for their disciplines. Evidence for this conclusion is given in Table 9 (p. 10) where the subject specialists give the SRAs average effectiveness ratings of 2.8 for ability to negotiate questions, 2.4 for ability to develop search strategies, 2.8 for ability to provide effective reference service in their subject areas, and 2.7 for overall ability to provide reference service. This perception matches closely the 36 percent correctness of the answers given by the SRAs in the Unobtrusive Question Test (see Table 4, p. 6).

A number of SRAs commented on the need for the professional librarians to become more involved in the training programs so the level of effectiveness can be raised:

"Training sessions so that we fully understand and can help patrons in their area."

"Take time to show us hints without us asking for them. Help format an interest in their field."

"I think they should be more involved with training the student assistants."

"Be more available, give more workshops on reference materials."

"I happened to be trained at an unfortunate time. My supervisor who was doing the majority of the training was not here. Thus other individuals filled in, making my training somewhat unorganized and confusing."

Such involvement would require a greater time commitment by the SSs in preparing training materials and interacting with the SRAs than currently, but it is essential if SRAs are to provide effective reference service.

On other training topics, the SSs considered a knowledge of emergency procedures a very important training topic for all employees. They rated it 4.7, 4.6, and 4.3 for professionals, DAs, and SRAs respectively. The decline in importance from librarians to students probably reflects the fact that the full-time employees have experienced an emergency and are also the ones responsible for providing leadership when one occurs.

Inservice Training Methods

According to Table 15, weekly training meetings are the most often used

Table 15. Inservice Training Methods Used and Their Usefulness

Training Methods	Times Used	Dept. Asst.	Student Assist.	Aver.
One-on-One personal instruction	27**	5.0*	4.5	4.75
Weekly reference staff meeting	33	3.6	4.1	3.90
Instruction in research strategies	27	3.8	4.0	3.90
Instruction from subject specialists	31	3.8	3.8	3.80
Worksheet exercises or problems	25	4.0	3.6	3.80
Show-and-Tell of reference sources	28	3.8	3.7	3.75
Subject bibliography handouts	26	3.8	3.5	3.65
Posted memos or notices	27	3.5	3.3	3.40
Orientation visits to other levels	21	3.3	3.5	3.40
Guest speakers from other areas	18	3.3	3.4	3.35
Composite Ratings:		3.8	3.7	3.74

**33 total respondents *1=Not useful; 5=Very useful

inservice training method (mentioned by all respondents) and received a relatively high effectiveness ranking (3.9). Obviously, all the other training methods (except for memos or notices and one-on-one instruction) are probably used at sometime during the weekly meetings. If the group sessions involve the SSs who show-and-tell, review search strategies, and provide follow-up with exercises for practical application, then it is safe to assume that the staff meeting could be the vehicle for implementing all of the methods deemed most important.

The DAs and the SRAs agreed that the most useful method of inservice training is the one-on-one, side-by-side personal instruction (4.75). They also agreed on the importance of the SSs being involved in that method of training (3.8) and giving them instruction in research strategies (3.9).

Some of the comments from SRAs showed how strongly they felt about such a training regimen:

"Training (lecturing) should be accompanied by several good hours of working side-by-side with an experienced full-time librarian."

"I only got some occasional one-on-one with the full-time librarian if I could possibly make it before he left."

"I'd like to see more time spent with each subject specialist so I can really know what sources I have to work with."

"Subject librarians should try to have more dialogue with student workers- this would create a better working relationship and both would learn more about the other's work."

On the importance of being trained in research strategies, students commented:

"Maybe the subject specialists or others can map out search strategies and prioritize the order that resource materials are used. For example, which periodical indexes to use 1st, 2nd, etc. for particular types of questions."
"I feel all SRAs for all floors should be exposed to lectures on the library's bibliographic instruction program detailing recommended research methodology and sequence."

SRAs also highly recommended the use of exercises or problems (3.8) that give them hands-on experience:

"Students should have the opportunity to go through more possible searches with work sheets."
"A weekly worksheet of real and applicable questions that might arise, covering eventually all aspects of the subjects on this floor and all the important reference materials."

"Follow-up to encourage learning and remembering of stuff discussed in weekly meeting."

"Written training manual with library policies as well as specific sources and strategies for our subject areas. Manual should include exercises which give 'hands on experience'."

"Emphasis on doing, not listening."

The show-and-tell approach is considered fairly effective (3.75), but would be more so if used in conjunction with practical exercises, more graphics, and better written explanations of the search strategies that relate to the titles and concepts presented. These suggestions are confirmed by the following comments:

"During the orientation process we were shown a lot of material but remember very little of it."

"Giving me practice examples would help the most."

"Maybe having time to present clear and logical (good graphics) presentations geared to what reference assistants need to know."

"The subject specialists could be more useful if they explained why they used a certain search strategy."

"Perhaps Policies, frequently-used reference works, LC & Dewey breakdowns for your section, etc. could be condensed in written form for memorization."

Methods involving less personal interaction--posted memos or notices and handouts--were not considered as effective. The two groups also agreed that information about other levels of the library is not a high priority. Guest speakers (3.35) or orientations from other levels (3.4) and written notices (3.4) are perceived as being of the least value, although their ratings are still above midpoint. However, the lack of adequate referrals noted in the Unobtrusive Question Test suggests that SRAs may not be fully aware of the importance of being informed about the resources and services available on other floors.

The data and comments on training presented above indicate that the methods which make it possible for the new employee to interact one-on-one with experienced personnel and have follow-up problems or exercises to get them involved with the sources and strategies seem to be the most effective. However, there is no substitute for on-the-desk experience. As one SRA remarked: "Experience and time are the two best ways of learning the reference desk, provided that one is trying to improve all the time."

Many of the statements made thus far indicate a strong desire by the SRAs to have their desk experience include more involvement with the subject specialists so their training can be enhanced. They are suggesting more of an apprenticeship environment where they can benefit from the experience and the expertise of the professionals. And then they want continued follow-up instruction, review, and backup support from SSs.

On most levels of the library there are too many disciplines for a short-term student employee to master. As one of the SRAs stated, ". . . but there is so much to know." Unfortunately, SRAs graduate by the time they achieve the level of competency that would permit them to provide adequate service; yet they are asked to assume responsibility for reference service alone, after only a few weeks (or less) of training. They are frustrated by the lack of adequate training and professional support they feel is necessary for them to be satisfied with the service being provided.

Each library reference department must seriously evaluate the training being given those who work with the public at the reference desks and the level of involvement by the professional librarians in that training. More creative, practical, and thorough training must take place if the current SRA frustrations are to be alleviated and their level of correct responses raised above 36 percent.

Professional Librarian Reference Desk Service Role

The decision to remove professional librarians from assigned hours at the reference desks and to replace them with SRAs was perhaps the most controversial decision of the major organizational changes suggested by the Library Council. The study surveyed all 17 of the subject specialists and the two professional librarians at General Reference to obtain the following information:

1. Their attitudes toward assigned desk hours.

2. Their attitudes toward reference service as a professional responsibility.

3. The role of assigned reference desk hours in maintaining and improving their professional competence.

4. The role of assigned reference desk hours in maintaining and improving reference service in the library.

The SSs overwhelmingly (see Table 16) feel that having professional librarians work assigned hours at the desk would have direct and substantial

Table 16. Rating of Values of Professional Librarians Working Assigned Reference Desk Hours

Perceived Value	Yes	No	% Yes	% No
Monitor patron demands	15	3	83%	17%
Keep abreast of new ref. tools	13	5	72%	28%
Train/monitor ref. assistants	16	2	89%	11%
Strengthen esprit de corps	12	6	67%	33%
Strengthen ties to academic dept.	8	8	50%	50%
Receive more referrals from desk	12	6	67%	33%
Improve overall reference service	13	5	72%	28%

impact on improved overall reference service. The data also show that monitoring patron demands, keeping abreast of new reference tools, training and monitoring reference assistants, strengthening esprit de corps, and receiving more referrals from the desk would also be improved with professionals working assigned desk hours.

The SSs themselves can obviously provide a higher quality reference service at the desk than nonprofessionals because of their expertise and experience. Yet, working at the desk to train and monitor SRAs was the highest rated benefit the SSs perceived from assigned desk hours. As one observed: "Not working side by side with student assistants denies them the benefit of my experience." Certainly, increasing their contact with the DAs and SRAs would enable them to train and act as role models for the other staff, preparing them to function more effectively during the hours they are alone on the desk and helping to relieve the frustration resulting from the present lack of interaction.

But the SSs felt also that their own reference expertise and capability suffered from lack of use. Seventy-two percent felt it would help them keep abreast of new reference tools and maintain facility with other tools, and 83 percent felt it would help them monitor patron demands. One said: "I lose track of lesser used sources and have less feeling for what's really going on--patron needs, etc." Several others observed that they are not only seeing their skills slip away, but their job satisfaction is also deteriorating as they see what they consider the central mission of the library, assisting patrons in filling their information needs, declining while they perform other assigned responsibilities.

Some of these have said they go out to the desk from time to time for stimulation and a "breath of fresh air." They feel the decision to remove the professional librarians from the reference desks was made without regard to the unique abilities of many of these librarians for reference service, their feelings of job satisfaction in a reference librarian role, their lifetime commitment to patron service, and their many years of experience.

However, not all SSs agreed with having professionals assigned desk duty. The variables that defined the two groups, according to the data, were length of time as a reference librarian and length of time as a professional librarian. In general, those with more experience as reference librarians as well as those with more years in the profession were the strongest in favor of assigned desk hours.

Table 17 shows the number who see no benefits and the number of assigned hours recommended by those who do see benefits based on years of reference experience. Table 18 shows the same information based on years as a professional librarian.

On the average, the four recommending no assigned desk hours have significantly less reference experience and are newer in the library profession. Including the four who recommended no desk hours, the average recommendation was for 6.1 hours per week of assigned desk hours. Excluding

those four, the recommendation was for 7.9 hours per week of assigned desk hours with several recommending some evening hours being required.

Table 17. Subject Specialist Perception of the Benefit of Assigned Desk Hours and Recommended Hours Based on Years of Reference Experience

Years of Ref. Experience	No Benefit	Benefit/Suggested Hours Per Week							
	0 Hours	3	5	5-8	6-10	10	10-12	10-15	Ave.
2	X						X		5.5
3	X		X	X					3.8
5	X								0.0
7	X								0.0
10						X			10.0
11						X			10.0
12					X				8.0
14		X	X			X			6.0
15				X					6.5
20			X					X	8.8
22						X			10.0
24					X				8.0

Table 18. Subject Specialist Perception of the Benefit of Assigned Desk Hours and Recommended Hours Based on Years of Professional Experience

Years of Prof. Experience	No Benefit	Benefit/Suggested Hours Per Week							
	0 Hours	3	5	5-8	6-10	10	10-12	10-15	Ave.
1	X		X						2.5
10	X						X		5.5
11			X						5.0
12					X				8.0
13	X			X					3.3
14	X	X							1.5
15				X		X			8.3
16			X						5.0
17						X			10.0
20						X		X	11.3
24					X	X			9.0

The SSs reported that working desk hours helped them keep up not only in their assigned subjects but in all the subjects on their floor, helped them maintain their awareness of patron demands on library collections they are responsible for building, and helped them assess the effectiveness of and need for library instruction of patrons and training of SRAs and DAs. These are all important factors, since all SSs are expected to act as a backup resource at the desk during assigned hoursfor all subjects, not just for their own areas of expertise. They also apparently view reference service as an important

component in fulfilling their library use instruction and collection development responsibilities. In general, then, the SSs recommend a return to assigned desk hours to help keep themselves fully professional.

Conclusion and Recommendations

The objective of a library is not merely to warehouse information, but to help patrons find the information they desire. Though all aspects of librarianship are concerned with this goal, it is at the reference desk that the process of determining the patron's need, formulating a research strategy to fill that need, and providing accurate and complete information to the patron is finally tested. Providing professional quality reference service is an complex process, requiring extensive subject expertise, knowledge of library collections and systems, and years of practical experience.

This study has shown that serious problems beset the reference service as it is presently organized in the Lee Library. The SRAs and DAs feel isolated from the professionals who have the requisite knowledge and skills. The referral of patrons to the SSs works fitfully at best. The training given reference staff is inconsistent and sometimes ineffective. And, most of all, the SRAs answered correctly and completely only 36 percent of the questions asked of them in an unobtrusive test. Obviously, steps must be taken to remedy the deficiencies noted in this report. To accomplish this, reference service must receive a higher priority in the professional assignments of subject specialists.

Recommendations

The problems with reference service discovered in this study are related to three major areas where action needs to be taken:

1. Setting standards of performance for reference service provided at the reference desks.

2. Improving the training program for all personnel involved in reference service.

3. Involving the subject specialists more heavily in reference responsibilities.

Performance Standards

Standards need to be set for each of the components of reference service: question negotiation, search strategies, referrals, the amount of time to spend with patrons, and the percentage of correct answers that will be acceptable. In addition, standards are needed for the quantity and quality of professional time assigned to desk and desk backup responsibilities, hours of service, and job qualifications and probationary criteria for SRAs and DAs. To assure that these standards are monitored and maintained, the library should also establish a system for ongoing evaluation of the reference services of the library. This is especially necessary because of the high turnover rate among SRAs, many of whom work fewer than two years. Without a permanent reference staff, it is

impossible to create a solid foundation on which to build an improved reference service. In a real sense, we will always be starting over.

Training Improvement

Since the training program for reference personnel at present lacks uniformity, consistency, and structure, the effectiveness of the present program should be fully evaluated and needed changes made. Out of this evaluation should grow a uniform reference training program for the division. The division should develop a program on topics applicable to all reference departments. Departments should develop programs for topics unique to that department. And the library Training Committee should develop programs for training all library student employees on topics of general library application that can be used by all divisions. This division of labor would avoid much duplication of effort and ensure that the program is comprehensive, coordinated, and carefully structured to achieve an optimum level of competence by all reference personnel.

In developing this training program, care should be taken to ensure that

1. The training is based on sound instructional theory--setting objectives, using effective teaching methodologies, evaluating results, and assuring individual accountability.

2. Checklists of topics and priorities are developed to ensure thorough coverage of all essential topics.

3. All subject specialists are involved in planning, developing, implementing, and monitoring the program.

4. The program has an apprenticeship emphasis with the subject specialists spending time in one-on-one and side-by-side training to help SRAs and DAs learn reference skills through example and supervised practice.

Subject Specialist Involvement

The SRAs, DAs and most SSs themselves feel that the subject specialists with their professional experience and expertise should provide the necessary foundation for improving reference service both directly and indirectly. The data suggests that subject specialists

1. Need to make a greater commitment to reference service and to consistently honor their reference desk assignments.

2. Need to have closer relatinships with other reference desk personnel to improve the referral environment.

3. Need to be more readily accessible to patrons and other reference personnel to give them the benefit of their expertise and experience.

4. Need to be assigned evening reference desk duty.

5. Need assigned reference desk duty to maintain and improve their reference skills and to keep abreast of patron demands and needs for services and collections.

6. Need to be more heavily involved in reference training and in monitoring the effectiveness of their training through one-on-one involvement with reference personnel.

7. Need to assume more responsibility for serving patrons with lengthy requests when desk personnel do not have sufficient time because of other patron demands.

These recommendations should be addressed immediately since it is critical that we improve our reference service effectiveness as soon as possible. The responsibility for implementing these recommendations lies with all the professional librarians of the division and the General Reference Department. Coordination of the training evaluation, the training program development, and the setting of standards should be directed by the soon to-be-appointed Reference Services Committee. But all subject specialists should be called on, as needed, to participate in these activities. The recommendations on subject specialist involvement should be addressed by the assistant university librarian for collection development, the associate university librarian, and the Department Chairmans Committee. Through a united effort, the reference service can be improved and at the same time enhance the other responsibilities of the professional librarians.

Appendix A

LIBRARY REFERENCE SERVICE QUESTIONNAIRE

Day of Week M T W Th F S
Time of Day _____
Level of Library 1 2 3 4 5

Thank you for taking a few minutes to fill out this questionnaire. The results will be used to improve the library's service.

1. Please indicate your status (check only one).

   a) ____ Undergraduate student
   b) ____ Graduate student
   c) ____ Faculty/Staff
   d) ____ Other (specify): _____

2. Check the following statement which BEST describes what you saw as you approached the reference desk.

   a) ____ The reference assistant was free to help you.
   b) ____ The reference assistant was assisting another patron(s) at the desk.
   c) ____ The reference assistant was away from the reference desk.
   d) ____ Other (specify): _____

3. Briefly state the question you asked the reference assistant.

   _____

   _____

4. Did the reference assistant ask questions to help clarify your question?

   a) _____ Yes b) _____ No c) _____ Did not need clarifying

5. Please indicate the way(s) in which the reference assistant dealt with your question. (Check all that apply)

   a) ____ Answered it without consulting any reference sources(s) (i.e. books, computers, handouts, files, etc.)
   b) ____ Consulted reference source(s) and found the answer for you
   c) ____ Showed you reference source(s) that would answer your question and explained how to use it.
   d) ____ Referred you to specific sources to find the answer on your own
   e) ____ Encouraged you to come back for further assistance
   f) ____ Consulted with other staff member(s)
   g) ____ Other (specify): _____

(over)

6. If the reference assistant referred you to sources to use on your own, did he or she check back to see if you were finding the information you needed?

a) ____ Yes b) ____ No c) ____ Not applicable

7. Did the reference assistant (Check all that apply)

a) ____ offer to work on your question and call you or have you check back?
b) ____ refer you to another reference desk or area in the Lee Library?
c) ____ refer you to a source or area outside the Lee Library?
d) ____ refer you to a subject/professional librarian?
e) ____ indicate that an answer to your question was not available?
f) ____ other (specify): _____

8. Did you locate/receive a satisfactory answer to your question?

a) ____ Yes b) ____ Partially c) ____ No

9. What is your subjective impression of the reference assistant in regard to him or her being: (Circle the appropriate number)

a) Approachable 5 4 3 2 1 Unapproachable.

b) Helpful 5 4 3 2 1 Not Helpful.

c) Competent 5 4 3 2 1 Incompetent.

10. Were you satisfied with the quality of service you received? (Circle the appropriate number)

Yes 5 4 3 2 1 No

Additional Comments:

_____

_____

_____

THANK YOU for your assistance. Please return the questionnaire to the person who gave it to you.

Appendix B

Unobtrusive Question List

Listed below are the questions asked by "proxy patrons" at each of the five reference desks in the library.

Social Science Reference Questions (Level 1)

1-1 I have been looking all day for the 1986 volume of the Journal of Community Psychology (BF637.C6 J68x). It is not in the book stacks or on the sorting shelves. Is there any other place I can check for it?

1-2 Can you show me how to use BYLINE to find current books on the illegal drug trade in Columbia?

1-3 I need to find the address and director of the U. S. Information Agency.

1-4 Where can I find out which colleges offer associate degrees in engineering?

1-5 I'm writing a paper on authority structure and my instructor suggested that I use the ERIC indexes to find references. Can you show me how to use it?

1-6 I'd like to find a short statement that explains a Passive Aggressive Personality?

1-7 I just read a book by Jefferey Pfeffer called Power in Organization, and I need to see if anyone has quoted (cited) it in the last few years.

1-8 Where can I find a list of the delegates to the Continental Congress?

1-9 Where would I go to find what was contained in the Connecticut Compromise of 1787?

1-10 I can't find a reference in the Monthly Catalog to the "Articles of Incorporation" that my husband and I need to study before we start a business in Utah. Can you help me?

1-11 I need to find a copy of the 1981 Senate hearings that were held on the Anti-Arson Act of 1982.

1-12 While I was doing research on my ancestor James O. Thompson I found a reference to a report titled "Report on Petition of James O. Thompson" that was made to or by the U. S. Congress in February 1837. Is there any possibility this library might have a copy of it?

Science Reference Questions (Level 2)

2-1 I've been looking all day for the 1986 volume of Physiologist (QP 1 .P55). It is not in the book stacks or on the sorting shelves. Is there any place else I can check for it?

2-2 Someone told me to use SM instead of S when I am searching BYLINE. Which one should I use and what will I find?

2-3 I have this citation: Proc Natl Acad Sci 72(9): 3453+ on salmonella. Where is it?

2-4 How do you use Science Citation Index to find an article on phospholipid metabolism?

2-5 What is the value of avogadros number?

2-6 What is another name for folic acid and what is its chemical formula?

2-7 What is the nutritive value of a McDonald's Big Mac?

2-8 I can't find anything on VLSI in the Engineering Index.

2-9 I need to know the gold production in the U. S.

2-10 What is a Phi unit in geology?

2-11 I need to find the USGS Bulletin on the National Earthquake Hazards Reduction Program.

2-12 I need to know a chemical formula for any kind of toothpaste.

General Reference Questions (Level 3)

3-1 I've been looking all day for the 1986 volume of the Middle East Journal (call number DS1.M5). It's not in the book stacks or on the sorting shelves. Is there any place else I can check for it?

3-2 I found a book on BYLINE last week entitled L'Inquisition Espagnole. I need to look it up again and now I can't find it listed. Can you help me?

3-3 I need to know where the Ogoki River is located.

3-4 I want to read about Larry King, the radio talk-show host. I need information about his life and I need a picture of him.

3-5 I need to know if the Manoogian Foundation gives scholarships, and if so, for what purpose. Also, what is their address?

3-6 How can I find out the number of households in Utah that have cable TV service?

3-7 I need to know the formula for toothpaste. No particular brand is needed, just basic ingredients.

3-8 Where can I look to find out who is the new Speaker of the House (as of the most recent Congress - January 1987)?

3-9 Where are your books on animation?

3-10 Do you carry the National Directory of Manufacturers' Agents?

3-11 I need to know the publication information for this book. It was published in the 1890's probably in France. Author: Cyriaque Helson; Title: La Siderurgie en France et a l'etranger.

3-12 I am trying to find information on 19th century Shakespearean theatre productions in Utah. Do you have a bibliography or index that can help me find articles or books on this?

History/Religion Reference Questions (Level 4)

4-1 I've been looking all day for the 1986 volume of the Middle East Journal (call number DS1.M5). It's not in the book stacks or on the sorting shelves. Is there any place else I can check for it?

4-2 I found a book on BYLINE last week entitled L'Inquisition Espagnole. I need to look it up again and now I can't find it listed. Can you help me?

4-3 I need the address of the (LDS) Brussels mission.

4-4 I need the address of the Lee County (Alabama) Historical Society.

4-5 I want to see the latest official policy statement from the First Presidency on birth control.

4-6 I'm looking for church records for the parish of Frating in England. I know it is in the county of Essex but the lady at the genealogy desk said I need to find out what archdeaconry and diocese it belonged to and that you could look that up for me.

4-7 I need brief biographical information on important people in Italian history.

4-8 I need some books on Jewish marriage customs. How do I find them on BYLINE?

4-9 Just for fun, I want to do an authentic middle ages dinner for some

friends. Do you have anything that will tell what the common foods were, especially vegetables?

4-10 I'm doing an assignment for my tourism class and I need to find a current (1985 or 86) list of travel agencies in the Netherlands.

4-11 I am doing a paper on Cambodia and I need current information, no more than 2-3 years old, on its historical background, what's happening today, and its current economic and social situation.

4-12 I need to read the "Orlah" which is a part of the Talmud. My teacher said it would be in the red set on the front row of your reference stacks (BM500.E57x) but I can't figure out how they're organized. Can you show me which volume it is?

Humanities Reference Questions (Level 5)

5-1 I've been looking all day for the 1986 volume of PMLA. It's not in the book stacks or on the sorting shelves. Is there any place else I can check for it?

5-2 I'm trying to find a book of quotes or anecdotes by Mark Twain. How can I find it on BYLINE?

5-3 For my art history class I need to find out what the Ash Can School of painting is and who some of the artists who belonged to it are.

5-4 I need to know how many people in the world speak Spanish?

5-5 For my political science class I need to find a copy of Richard Nixon's resignation speech. Would the library have a copy? [If asked, you don't remember the year.]

5-6 I saw some of the TV show series and would like to find a book review of Judith Krantz' I'll Take Manhattan?

5-7 For my Humanities 101 class I need the full official title of Schubert's symphony that is sometimes called "The Great," including the thematic catalog number.

5-8 I need to find when Eugene O'Neill's Long Day's Journey into Night was first performed and in what theatre.

5-9 When did they start rating films with "G," "PG," "R," and "X," and what is the official name of this system?

5-10 I'm writing a paper for my English 314 class and would like an annual review of the criticism on Hawthorne for the last few years.

5-11 I'm trying to write a paper comparing the art, the literature, the music, and the philosophy of the Italian Renaissance period. Do you

have a book that does this so I don't have to look up all the subjects separately?

5-12 I am trying to find information on 19th century Shakespearean theatre productions in Utah. Do you have a bibliography or index that can help me find articles or books on this?

ESCALATOR QUESTIONS

The correctness of answers given to these questions was determined by whether or not the desk assistant negotiated adequately to arrive at the "true" question (step 3).

Social Science (Level 1)

1-13
Step 1: Where are your education encyclopedias?
Step 2: I need information on test scores.
Step 3: I want to compare the ACT and SAT test scores.

1-14
Step 1: Where are your sociology indexes?
Step 2: I'm trying to find information on drug abuse.
Step 3: I want to find an article which discusses the impact of a child's drug use on family relations, communications, attitudes, etc.

1-15
Step 1: Where do you keep information on the military.
Step 2: I need information on Israel's army.
Step 3: I would like statistics which show it's army strength--manpower, equipment, etc.

Science (Level 2)

2-13
Step 1: My teacher told me to look in PDR to get some information on codeine. Where can I find it?
Step 2: I need to know if it is habit forming?
Step 3: I take Tylenol with codeine and want to know if I should be worried about the codeine in it.

2-14
Step 1: My teacher told me to look in PDR for some information on measles.
Step 2: It's for an oral report in my English 316 class.
Step 3: I need non-technical information for a lay audience.

2-15
Step 1: Where can I find your books on mathematics?
Step 2: I need some information on probability.
Step 3: I really want just a short explanation of probability theory to see if I would be interested in taking a class in it.

General Reference (Level 3)

3-13 Step 1: I need books on architecture.
Step 2: Information on English architecture.
Step 3: A book on ancient castles in England.

3-14 Step 1: Could I use the World Almanac?
Step 2: I need statistics on college students.
Step 3: Want average height of U. S. college-age women.

3-15 Step 1: Where can I find Time and Newsweek magazines?
Step 2: Need articles from last few months.
Step 3: Information on fifth amendment stand of Oliver North.

History/Religion Reference (Level 4)

4-13 Step 1: Where are your genealogical reference books?
Step 2: I need one on the meaning of surnames.
Step 3: I'm looking for a German surname.

4-14 Step 1: Where are your history books on slavery?
Step 2: I want a summary article on slavery in ancient history.
Step 3: In rome.

4-15 Step 1: Where can I find information on military history?
Step 2: I want the history of Mormon military units?
Step 3: The Mormon Battalion specifically.

Humanities Reference (Level 5)

5-13 Step 1: Where are your juvenile books?
Step 2: I'm looking for something that will help me select a book dealing with children with health problems.
Step 3: I want a book about a girl dying of cancer.

5-14 Step 1: Where can I find information on Indians?
Step 2: I'm looking for something about Indian art.
Step 3: I want some articles and books on Navajo weaving and rugmaking.

5-15 Step 1: My teacher said to come to the library and look up my topic in the MLA Bibliography. Where can I find it?
Step 2: It's for a paper for my Linguistics 480 Translation class.
Step 3: I want to do my paper on translation problems in relation to the theater.

Note: The escalator questions were of two types. One asked for a specific work or area supposed to contain the answer to the patron's question. The other asked for information on a topic. Both types require negotiation with the patron to determine the exact need.

Appendix B

Reference Service Study

Proxy Instructions

The library is presently evaluating the quality of the reference service provided at the reference desks. An important part of this evaluation is to determine the correctness and completeness of the answers given, the ability of the reference desk assistants to negotiate patron needs, and the overall competence of the service. While we are not attempting to evaluate the work of specific staff members, it is important that none of the reference desk staff know that they are being tested so they will not change their usual behavior.

Overview of the Study

During an assigned time block during the week of March 16-20, fifteen proxies will each ask one question at each of the five reference desks in the Lee Library. Following each reference transaction, the proxy will fill out a form to report the results. It is important that these forms be filled out with care and deliberation. When you have completed asking the assigned questions and filling out the forms, return them to

_____.

Proxy Procedures

1. The questions you have been assigned are coded so that each question is asked at the appropriate reference desk:

1.1 - 1.15	Social Science Reference Desk, Level 1
2.1 - 2.15	Science Reference Desk, Level 2
3.1 - 3.15	General Reference Desk, Level 3
4.1 - 4.15	History Religion Reference Desk, Level 4
5.1 - 5.15	Humanities Reference Desk, Level 5

   Since one of the major functions of General Reference is to refer patrons to other reference desks, some of the questions for that desk may seem inappropriate. However, all questions must be asked at the desk indicated above.

   We have attached each question to a Reference Question Report Form. Please do not detach these or we will not be able to match up the question with your report.

2. Before asking each question, review the Reference Question Report form to be sure you understand what you need to be conscious of as you are served at the reference desk. Each question may require a somewhat different response from you.

All questions ask you to be aware of the situation at the desk, some time factors, the kinds of questions asked by the desk assistant, the kinds and numbers of sources used, the answer received, and your subjective impressions of the library assistant. But some questions may require you to be more conscious of the strategies used to provide a full answer to the question.

3. Be sure you understand the question you are to ask and its context so if the reference assistant asks you for further clarification you can provide some kind of intelligent response. Do Not suggest types of sources or places where the answer may be obtained. Let the desk assistant make the moves.

4. Be sure you understand the kind of answer that is required. Some questions are relatively easy in this respect, requiring a specific fact or piece of information. Others require the use of a strategy or several steps or sources to provide the answer. The answer given you with the question is only to help you in responding intelligently. It should not be used to prompt the reference assistant.

5. We have tried to provide a rationale for why you are asking for the information in each question, but if there is not a specific purpose specified, indicate that you need the information for a class assignment or to write a paper.

6. Try to act as normal and natural as possible. DO NOT let the reference assistant see the paper with the question on it or the report form. You might find it useful to write the question or take a few notes from it on a piece of paper that you can show to the reference assistant should he ask. This might help with spelling, etc. Fill out your report form away from the desk area.

7. Do not argue or be persistent in trying to obtain an answer. If the question requires two parts, e.g., who did it and when, be sure the desk assistant understands that you need both parts. Take the answer given you even if it is incorrect. If they can't find an answer don't prompt or help them with clues or suggesting sources, etc.

8. If the reference assistant tells you to go on your own to find a source rather than helping you find it or looking up the answer for you, follow his instructions and try briefly to find your answer in the source. DO NOT go back and ask for help if you don't find it.

9. If you are asked to come back later when someone more knowledgeable can help you, consider it a referral and do not return.

10. If the reference assistant refers you to a professional librarian and doesn't go with you, just tell the librarian that you are part of the reference evaluation study and consider it a referral. Do not have them help you find an answer. We are only evaluating the desk reference service. If the reference assistant goes with you, Do Not divulge this information in his presence. You might suggest that you haven't got time right now and offer to come back to see the professional librarian later. Don't return, of course.

11. Do not ask your question if a professional librarian is staffing the desk. Come back later to ask a student assistant.

12. When you have asked all five questions and completed your reports, return the questions and report forms intact to your supervisor named above.

Special Instructions for Escalator Questions

You have been given five specially designed questions to evaluate the effectiveness of the reference assistants in negotiating patron needs to a specific level before they begin to help you find an answer. In addition to the previous instructions, you will need to be particularly aware of several other factors.

1. The questions have been structured so that your initial request will be stated in very general terms. Some of the questions are stated in such a way that you will appear to know exactly what you need and the source. You will merely ask where it is, e.g. "Where are your juvenile books?" or "My teacher told me to look in PDR to find some information on codeine. Where can I find it?" Others will be stated as broad areas, such as "I want to find some information on mathematics" or "I need some information on Indians."

2. If the reference assistant responds to your initial request by telling you where to find it, pointing to the area, or giving you the source requested, accept his help and go there or look in the source trying to find your answer. Don't spend too much time looking, but don't arouse his suspicions by just walking away. Don't go back and ask for additional help. Just leave after looking briefly and fill out your report form.

3. If the references assistant negotiates further to find out exactly what you are looking for, give him the information as stated in Step 2. This is a little more specific, but it is still not adequate to find the best answer or to develop a strategy for attacking the problem. Take it one step at a time, and do not provide any information unless his questions call for it.

4. If the reference assistant negotiates until you reach Step 3, then follow through with him to find an answer to your question as you would with other questions.

Appendix B

Reference Question Report

1. Question was asked: Day _____ Time _____

2. Check the following statement that BEST describes what you saw as you approached the reference desk for help.

   a) _____ The reference assistant was free to help me.
   b) _____ The reference assistant was preoccupied with a library project, and I had to get their attention.
   c) _____ The reference assistant was helping another patron at the desk, and I had to wait _____ minutes for help.
   d) _____ The reference assistant was away from the reference desk, and I had to wait _____ minutes for help.

   e) _____ Other (specify):_____

3. Question asked: [This has been stapled to this report sheet. Please do not separate them.]

4. Did the reference assistant ask for any information that might help them to be sure they understood your real need?

   Yes_____ No_____

   If yes, what did they ask? (Summarize if necessary)

5. Indicate the way in which the reference assistant dealt with your question.

   a) _____ Answered it without consulting reference sources, i.e., books, computers, files, catalogs, handouts, etc.
   b) _____ Consulted <u>a single</u> reference source and found the answer.
   b) _____ Consulted <u>several</u> reference sources and found the answer.
   c) _____ Showed you reference source(s) that would answer your question and <u>explained how to use it</u>.
   d) _____ Referred you to specific source(s) to find the answer on your own.
   e) _____ Indicated that they could not find an answer.

   f) _____ Other (specify):_____

6. What answer did you get to your question?

7. Write here the name of the source(s) used:

8. If the reference assistant could not answer the question, did they

a) _____ Consult with other staff member(s) (not a professional librarian.)
b) _____ Arrange for you to meet with a professional librarian.
c) _____ Refer you to another reference desk or area in the Lee Library.
d) _____ Refer you to a source outside the Lee Library.
e) _____ Offer to work on it and have you return later.

f) _____ Other (specify):_____

9. Approximately how long did you consult with the librarian?
_____ Minutes.

10. What is your subjective impression of the librarian in regard to

a) Approachability? _____

_____

b) Helpfulness?_____

_____

c) Knowledge?_____

_____

d) Overall Competence?_____

_____

Reference Desk_____ Your Name_____

Appendix C

Reference Assistant Questionnaire

As part of an evaluation of the reference service in the Harold B. Lee Library, we would like you to answer the following questions about your work as a reference assistant. Your responses will be anonymous, so please be open and honest in your answers. The information you provide will help us analyze our strengths and weaknesses and make the library a better place in which to work. Return your completed survey in the attached envelope by Monday, April 6.

I. Background

1. ___Freshman ___Sophomore ___Junior ___Senior ___Graduate

2. _____ Months worked as a reference assistant.

3. How helpful have you found your major to your reference work? (Circle appropriate number.)
   Not helpful 1 2 3 4 5 Very helpful

4. What other experiences or training that you brought with you to the job have you found valuable?

II. Job Responsibilities and Work Environment

5. How would you rate your workload at the reference desk in terms of

   a. Direct service to patrons (Circle number.)
      Too light 1 2 3 4 5 Too heavy
   b. Other assigned duties at desk (Circle number.)
      Too light 1 2 3 4 5 Too heavy

6. How much do the following interfere with or distract you from giving good patron service? (1 = Not at all; 5 = A great deal) (Circle number.)

Desk projects	1 2 3 4 5
Maintaining equipment	1 2 3 4 5
Reshelving and shelfreading	1 2 3 4 5
Other department assignments	1 2 3 4 5
Other reference assistants	1 2 3 4 5
Fulltime library personnel	1 2 3 4 5
Talkative patrons or friends	1 2 3 4 5
Other (specify below)	

7. As a backup resource to supplement your subject expertise, how would you rate the following? (1 = Not helpful; 5 = Very helpful) (Circle number.)

Other reference assistants	1 2 3 4 5

Fulltime department assistant/ department secretary	1 2 3 4 5
Department chairman/reference coordinator	1 2 3 4 5
Subject specialist librarians	1 2 3 4 5

8. How would you rate the subject specialist librarians in their role as a backup to you at the reference desk? (1 = Rarely; 5 = Almost always) (Circle number.)

Available	1 2 3 4 5
Approachable	1 2 3 4 5
Knowledgeable	1 2 3 4 5
Helpful	1 2 3 4 5

9. How could the subject specialist librarians be a more useful resource to you?

10. How important do you feel the "emotional climate" of the department is to your success as a reference assistant? (Circle number.)

Not important 1 2 3 4 5 Very important

11. How would you evaluate the "emotional climate" of your department in reference to the following? (1 = Very Negative; 5 = Very Positive) (Circle number.)

Your overall relationship with	
Department chairman/reference coordinator	1 2 3 4 5
Fulltime department assistant/department secretary	1 2 3 4 5
Subject specialist librarians	1 2 3 4 5
Other student reference assistants	1 2 3 4 5
Your feeling of being treated fairly in terms of job assignments, work schedules, etc.	1 2 3 4 5
Your feeling free to make suggestions	1 2 3 4 5
The way you are corrected or reprimanded	1 2 3 4 5
Your feeling of being appreciated	1 2 3 4 5
Your feeling of importance to the department	1 2 3 4 5

III. Reference Training

12. How would you rate the <u>initial</u> (1st month of employment) training you received for your job in reference to the following? (1 = Poor; 5 = Excellent) (Circle number.)

Structured and clearly organized	1	2	3	4	5
Provided at appropriate time (when most needed or useful at desk)	1	2	3	4	5
Covered areas you needed to know about to function at a basic level	1	2	3	4	5
Presented in such a way that you could understand and remember it	1	2	3	4	5
Supported with useful exercises or worksheets that helped you apply concepts	1	2	3	4	5
Included on-the-job instruction by supervisor (or other trainer) working beside you	1	2	3	4	5
Prepared you adequately to function at a basic level in handling patron requests	1	2	3	4	5
General library orientation by Personnel Office	1	2	3	4	5

Additional comments or observations:

13. Which of the following topics or activities did your <u>initial</u> (1st month) training include? (Check all that apply.)

_____ Library policies and procedures
_____ Desk routines (special loans, fines, locked case, etc.)
_____ Card catalogs and card indexes
_____ Job expectations (dependability, work habits, dress, etc.)
_____ Department organization, personnel responsibilities, etc.
_____ Patron service priorities
_____ Search strategies for answering patron questions
_____ Computer systems
_____ Tour(s) of the floor
_____ Tour(s) of other areas of the library
_____ Question negotiation and communication skills
_____ Other areas and services in the library

Reference sources:
_____ At desk
_____ On index tables
_____ In reference stacks
_____ Subject collections in stacks
_____ Reference sources on other floors
_____ Other (Specify)_____

14. Based on your work experience at the reference desk, indicate the importance of including the following topics in the initial (1st month) training of reference assistants. (1 = not important) (Circle number.)

Library policies and procedures	1	2	3	4	5
Desk routines (special loans, fines, locked case, etc.)	1	2	3	4	5
Card catalogs and card indexes	1	2	3	4	5
Job expectations (dependability, work habits, dress, etc.)	1	2	3	4	5
Department organization, personnel	1	2	3	4	5

responsibilities, supervision					
Patron service priorities	1	2	3	4	5
Search strategies for answering patron questions	1	2	3	4	5
Computer systems	1	2	3	4	5
Orientation tour(s) of the floor	1	2	3	4	5
Tour(s) of other areas of the library	1	2	3	4	5
Question negotiation and how to communicate effectively with patrons	1	2	3	4	5
Other areas and services in the library	1	2	3	4	5
Reference sources:					
At desk	1	2	3	4	5
On index tables	1	2	3	4	5
In reference stacks	1	2	3	4	5
Subject collections in stacks	1	2	3	4	5
Reference sources on other floors	1	2	3	4	5
Other Topics(Specify)	1	2	3	4	5

15. Following your initial training, you should have been receiving regular **inservice** training. Indicate which methods of training have been used and how helpful you have found them by (1) checking off in the blank the methods used and (2) ranking their usefulness. (1 = Least useful; 5 = Most useful)

_____	Weekly reference staff meeting	1	2	3	4	5
_____	Posted memos or notices	1	2	3	4	5
_____	One-on-One personal instruction	1	2	3	4	5
_____	Worksheet exercises or problems	1	2	3	4	5
_____	Subject bibliography handouts	1	2	3	4	5
_____	Instruction in research strategies	1	2	3	4	5
_____	Show-and-Tell of reference sources	1	2	3	4	5
_____	Orientation visits to other library departments	1	2	3	4	5
_____	Guest speakers from other areas	1	2	3	4	5
_____	Instruction from subject specialist librarians in the department	1	2	3	4	5
	Other (Specify below)	1	2	3	4	5

Suggestions for improving inservice training:

16. Additional comments about your employment or suggestions for increasing your work satisfaction: (Use back if necessary)

Appendix D

Department Assistant Reference Survey

As part of the evaluation of the reference service in the Harold B. Lee Library, we would like you to answer the following questions about your reference assignment and the reference service of your department. The information you provide, along with that we have received from the other surveys we are conducting, will help us analyze our strengths and weaknesses and make recommendations for improvements. Please complete your survey and return it to Don Howard in the attached pre-addressed envelope by Wednesday, April 15.

I. Background

1. _____ Years worked in your department.

2. _____ Months assigned reference responsibilities.

3. What previous work experience or training (library or nonlibrary) that you brought with you to this job have you found valuable in your reference assignment?

II. Job Responsibilities and Work Environment

4. How many hours per week do you spend at the following job assignments:

   a. Assigned desk hours. _____
   b. Backing up reference assistants at desk. _____
   c. Supervising reference assistants. _____
   d. Other department responsibilities. _____

   Comments:

5. How would you rate the subject specialists in their role as backup to the reference desk. (1 = Not helpful; 5 = Very helpful) (Circle the number)

a.	Available	1	2	3	4	5
b.	Approachable	1	2	3	4	5
c.	Knowledgeable	1	2	3	4	5
d.	Helpful	1	2	3	4	5

   Comments:

6. How could the subject specialist librarians be a more useful resource to you?

7. How would you rate yourself in your role as a backup to he student reference assistants? (1 = Rarely; 5 = Almost always) (Circle number.)

a.	Available	1	2	3	4	5
b.	Approachable	1	2	3	4	5
c.	Knowledgeable	1	2	3	4	5
d.	Helpful	1	2	3	4	5

Comments:

8. How important do you feel the "emotional climate" of the department is to your success as a department assistant? (Circle number.)

Not important 1 2 3 4 5 Very important

9. How would you evaluate the "emotional climate" of your department in reference to the following? (1 = Very Negative; 5 = Very Positive) (Circle number.)

a.	Your overall relationship with					
	1. Dept. chairman/ref. coordinator	1	2	3	4	5
	2. Subject specialist librarians	1	2	3	4	5
	3. Other student ref. assistants	1	2	3	4	5
b.	Your feeling of being treated fairly in job assignments, work schedules, etc.	1	2	3	4	5
c.	Your feeling free to make suggestions	1	2	3	4	5
d.	Way you are corrected or reprimanded	1	2	3	4	5
e.	Your feeling of being appreciated	1	2	3	4	5
f.	Your feeling of importance to the department.	1	2	3	4	5

Comments:

III. Present Reference Service

10. How effective do you perceive the present student reference desk assistants in your department to be in the following:
(1 = Very weak; 5 = Very strong; 0 = No perception)
(Circle number)

a.	Knowledge of subjects served by the department.	1	2	3	4	5	0
b.	Knowledge of reference collections.	1	2	3	4	5	0
c.	Ability to negotiate questions with patrons.	1	2	3	4	5	0
d.	Referring questions to you of an appropriate level of difficulty.	1	2	3	4	5	0
e.	Awareness and understanding of department and library policies.	1	2	3	4	5	0

f.	Relying on one another <u>appropriately</u> for information or knowledge they may lack themselves.	1	2	3	4	5	0
g.	Willingness to assume responsibility for enforcing library policies and procedures.	1	2	3	4	5	0
h.	Ability to help patrons understand library organization, classification systems, computer systems, catalogs, etc.	1	2	3	4	5	0
i.	Developing search strategies for helping patrons find and use combinations of reference sources in solving complex searches.	1	2	3	4	5	0
j.	Backing up other student reference assistants.	1	2	3	4	5	0
k.	Overall ability to provide effective reference service in your department.	1	2	3	4	5	0

Comments:

11. How effective do you perceive yourself in the following: (1 = Very weak; 5 = Very strong) (Circle number)

a.	Knowledge of subjects served by the department.	1	2	3	4	5
b.	Knowledge of reference collections in the department.	1	2	3	4	5
c.	Knowledge of reference sources and services in other areas of the library.	1	2	3	4	5
d.	Ability to negotiate questions with patrons.	1	2	3	4	5
e.	Referring questions to you of an appropriate level of difficulty.	1	2	3	4	5
f.	Awareness and understanding of department and library policies.	1	2	3	4	5
g.	Ability to help patrons understand library organization, classification systems, computer systems, catalogs, etc.	1	2	3	4	5
h.	Developing search strategies for helping patrons find and use combinations of reference sources in solving complex searches.	1	2	3	4	5
i.	Backing up reference assistants.	1	2	3	4	5
j.	Overall ability to provide effective reference service in your assigned subject areas.	1	2	3	4	5
k.	Willingness to assume responsibility for enforcing library policies and procedures.	1	2	3	4	5

Comments:

IV. Reference Training

12. How would you rate the <u>initial</u> (1st month of employment) training given the student reference assistants in your department in reference to the following? (1 = Poor; 5 = Excellent; 0 = Don't know) (Circle number.)

a.	Structured and clearly organized.	1	2	3	4	5	0
b.	Provided at appropriate time (when most needed or useful at desk).	1	2	3	4	5	0
c.	Covered areas they needed to know about how to function at a basic level.	1	2	3	4	5	0
d.	Presented in such a way that they could understand and remember it.	1	2	3	4	5	0
e.	Supported with useful exercises that helped them apply concepts.	1	2	3	4	5	0
f.	Included on-the-job instruction by supervisor (or other trainer) working beside them.	1	2	3	4	5	0
g.	Prepared them adequately to function effectively at the desk.	1	2	3	4	5	0
h.	Included effective general library orientation by library personnel office.	1	2	3	4	5	0

Comments:

13. Based on your work experience at the reference desk, indicate the importance of including the following topics in the <u>initial</u> (1st month) training of student reference assistants. (1 = Not important; 5 = Very important) (Circle number.)

a.	Library policies and procedures	1	2	3	4	5
b.	Desk routines (special loans, fines, locked case, etc.)	1	2	3	4	5
c.	Card catalogs and card indexes	1	2	3	4	5
d.	Job expectations (dependability, work habits, dress, etc.)	1	2	3	4	5
e.	Department organization, personnel responsibilities, supervision	1	2	3	4	5
f.	Patron service priorities	1	2	3	4	5
g.	Search strategies for answering patron questions	1	2	3	4	5
h.	Computer systems	1	2	3	4	5
i.	Orientation tour(s) of the floor	1	2	3	4	5
j.	Tour(s) and orientation of other areas of the library	1	2	3	4	5

k.	Question negotiation and how to communicate effectively with patrons	1	2	3	4	5
l.	Reference sources:					
la.	At desk	1	2	3	4	5
lb.	On index tables	1	2	3	4	5
lc.	In reference stacks	1	2	3	4	5
ld.	Subject collections in stacks	1	2	3	4	5
le.	Reference sources on other floors	1	2	3	4	5
m.	Other Topics (Specify)					
ma.	_____	1	2	3	4	5
mb.	_____	1	2	3	4	5

14. Indicate which methods of inservice training have been used and how helpful you have found them by (1) checking off in the blank the methods used and (2) rating their usefulness. (1 = Least useful; 5 = Most useful) (Circle number)

a.	_____Weekly reference staff meeting	1	2	3	4	5
b.	_____Posted memos or notices	1	2	3	4	5
c.	_____One-on-One personal instruction	1	2	3	4	5
d.	_____Worksheet exercises or problems	1	2	3	4	5
e.	_____Subject bibliography handouts	1	2	3	4	5
f.	_____Instruction in research techniques	1	2	3	4	5
g.	_____Show-and-tell of reference sources	1	2	3	4	5
h.	_____Orientation visits to other library departments	1	2	3	4	5
i.	_____Guest speakers from other areas	1	2	3	4	5
j.	_____Instruction from subject specialist librarians in the department	1	2	3	4	5
k.	_____Periodic review of initial training topics	1	2	3	4	5
l.	Other (Specify below)					
la.	_____ - - - - - - - - - - - - - - - - -	1	2	3	4	5
lb.	_____ - - - - - - - - - - - - - - - - -	1	2	3	4	5

Suggestions for improving inservice training:

15. Additional comments or suggestions that might help you increase your effectiveness in your reference responsibilities or improve the quality of reference service in your department.

Appendix E

Professional Librarian Reference Survey

As part of the evaluation of the reference service in the Harold B. Lee Library, we would like you to answer the following questions about your reference assignment and the reference service of your department. The information you provide, along with that we have received from the other surveys we are conducting, will help us analyze our strengths and weaknesses and make recommendations for improvements. Please complete your survey and return it to John Christensen in the attached pre-addressed envelope by Wed., April 15.

I. Background

1. _____ Years experience as reference desk librarian.

2. _____ Years experience as a professional librarian.

II. Present Reference Service

3. How effective do you perceive the present student reference desk assistants in your department to be in the following: (1 = Very weak; 5 = Very strong; 0 = No perception)

a.	Knowledge of subjects served by the department.	1	2	3	4	5	0
b.	Knowledge of reference collections in your department.	1	2	3	4	5	0
c.	Ability to negotiate questions with patrons	1	2	3	4	5	0
d.	Referring questions to you of an appropriate level of difficulty.	1	2	3	4	5	0
e.	Awareness and understanding of department and library policies.	1	2	3	4	5	0
f.	Relying on one another <u>appropriately</u> for information or knowledge they may lack themselves.	1	2	3	4	5	0
g.	Willingness to assume responsibility for enforcing library policies and procedures.	1	2	3	4	5	0
h.	Ability to help patrons understand library organization, classification systems, computer systems, catalogs, etc.	1	2	3	4	5	0
i.	Developing search strategies for helping patrons find and use combinations of reference sources in solving complex searches.	1	2	3	4	5	0
j.	Overall ability to provide effective reference service in your assigned subject areas.	1	2	3	4	5	0

k. Overall ability to provide effective reference service in all subjects served by your department. 1 2 3 4 5 0

Comments:

4. How effective do you perceive your fulltime department assistant paraprofessional to be in the following: (1 = Very weak; 5 = Very strong)

a. Knowledge of subjects served by your department. 1 2 3 4 5
b. Knowledge of reference collections in the department. 1 2 3 4 5
c. Knowledge of reference sources and services in other areas of the library. 1 2 3 4 5
d. Ability to negotiate questions with patrons 1 2 3 4 5
e. Referring questions to you of an appropriate level of difficulty. 1 2 3 4 5
f. Awareness and understanding of department and library policies 1 2 3 4 5
g. Ability to help patrons understand library organization, classification systems, computer systems, catalogs, etc. 1 2 3 4 5
h. Developing search strategies for helping patrons find and use combinations of reference sources in solving complex searches. 1 2 3 4 5
i. Backing up reference assistants. 1 2 3 4 5
j. Overall ability to provide effective reference service in your assigned subject areas. 1 2 3 4 5
k. Overall ability to provide effective reference service in all subjects served by your department. 1 2 3 4 5
l. Willingness to assume responsibility for enforcing library policies and procedures. 1 2 3 4 5

Comments:

5. How effective do you perceive yourself to be in the following areas of reference responsibility: (1 = Very weak; 5 = Very strong)

a. Backup to reference desk during assigned hours in your assigned subject areas. 1 2 3 4 5

b. Backup to reference desk during assigned hours in other subjects served by your department. 1 2 3 4 5

c. Advanced reference assistance in your assigned subject areas. 1 2 3 4 5

d. Knowledge of reference sources and search strategies in your assigned subject areas. 1 2 3 4 5

e. Knowledge of reference sources and research strategies in other subjects served by your department. 1 2 3 4 5

f. Ability to negotiate patron needs. 1 2 3 4 5

g. Awareness and understanding of department and library policies and procedures. 1 2 3 4 5

h. Ability to help patrons understand library organization, classification systems, computer systems, catalogs, etc. 1 2 3 4 5

Comments:

6. Approximately how many question referrals do you receive from the reference desk during a typical midsemester week under the following conditions:

a. During assigned desk backup hours. _____

b. During other office hours. _____

c. As appointments arranged for you by reference assistants at desk. _____

Comments:

7. During assigned backup hours for the reference desk, how would you rate your (1 = Rarely; 5 = Almost always)

Availability - in office for consultation 1 2 3 4 5
Approachability - willing and eager to help 1 2 3 4 5
Helpfulness - thorough in giving assistance 1 2 3 4 5

Comments:

III. Reference Service Training

8. How important do you think training in the following areas or skills is for student reference assistants (SRA), fulltime department assistant paraprofessional (FP), professional librarian (Prof). Fill in the blank below with a number 1 - 5 using the following scale: 1 = Not important; 5 = Very important.

	Topic	SRA	FP	Prof
a.	Knowledge of subject disciplines served by department.	____	____	____
b.	Knowledge of reference collections in department.	____	____	____
c.	Knowledge of reference sources and services in other areas of the library.	____	____	____
d.	Ability to negotiate questions with patrons.	____	____	____
e.	Referring questions appropriately to professionals or to other library departments.	____	____	____
f.	Providing patron services in your assigned subject areas.	____	____	____
g.	Department and library policies and procedures.	____	____	____
h.	Knowledge of library organization, call numbers, computer systems, catalogs, etc.	____	____	____
i.	Developing search strategies to help patrons find and use combinations of reference sources in doing complex searches.	____	____	____
j.	Desk routines (special loans, fines, locked case, etc.)	____	____	____
k.	Tours and orientations to other areas of the library.	____	____	____
l.	Emergency and disaster preparedness procedures.	____	____	____

Comments:

IV. Professional Involvement in Reference Service

9. Have you previously worked assigned hours at a reference desk?

_____ Yes _____ No

If yes, how has the new policy of working no assigned hours at the desk affected your ability to provide effective service?

10. Do you feel that working assigned hours at the reference desk has helped you or would help you as a professional librarian in the following areas?

a. Monitoring patron demands on the library in your areas of subject expertise. _____ Yes _____ No

Comments:

b. Keeping abreast of new reference tools in your assigned subject areas and in other disciplines served by your department. _____ Yes _____ No

Comments:

c. Training and monitoring the reference assistants by direct one-on-one interaction in actual reference situations. _____ Yes _____ No

Comments:

d. Increasing the feeling of identity and esprit de corps in the department. _____ Yes _____ No

Comments:

e. Strengthening the working relationship between you and the academic departments you are responsible for. _____ Yes _____ No

Comments:

f. Overcoming the reluctance of reference assistants to refer patron questions to you for fear of "bothering" you. _____ Yes _____ No

Comments:

g. Improving the overall quality of reference service in your department. _____ Yes _____ No

Comments:

11. If you indicated that working assigned hours at the reference desk would be beneficial in any of the categories above, how many hours per week would you consider a reasonable and practical number?

_____

Comments:

12. If you indicated that working assigned hours at the reference desk would not be beneficial in any of the categories above, what alternatives can you suggest to achieve these benefits?

13. Additional comments and suggestions:

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